From:	ehud barak <ehbarak1@gmail.com>
To:	R.P. Eddy <rpeddy@ergo.net>
CC:	
Date:	Wed, 7/31/2013 3:08:20 AM
Subject:	Re: Four Rivers overview July 2013.pdf

RP
If that's not too late I want to add two points re IC.
Do you know what's the content of the Gov. initiative mentioned on p. 8, named " National Security Reform Sector Strategy"?
Secondly, do you have info re the volume of FDI in IC in the recent years?
Thx again
Ehud Barak
On Jul 31, 2013, at 12:39 AM, "R.P. Eddy" wrote:

> Minister Barak,
> Will do right away. Thanks, RP
>
> Sent from my iPhone
>
> On Jul 31, 2013, at 5:38 AM, ehud barak wrote:
>
>> RP
>> I'll try to reach the guy with the material of 4 rivers and let you know his response.
>> Re Ivory Coast (and later on Nigeria). The material is very helpful. i'll appreciate it if you could ask Evan's guys whether they can find some material re the size of Govt. budget,how much of it is allocated for Defence?Police,Internal Security?.
>> If it's possible also to get even crude organisational charts of Defence/Internal Security organs and their names and roles and which Ministry is responsible for each of them?
>> I hope its not disrupts you
>> best
>> Ehud Barak
>>
>> On Jul 30, 2013, at 5:23 AM, R.P. Eddy wrote:
>>
>>> Dear Minister Barak,
>>>
>>> Thank you again for offering to introduce your colleague to Four
>>> Rivers (Ergo’s Myanmar-focused holding company); a high level overview is attached.
>>>
>>> Our strategy in Myanmar is to create operating companies with carefully selected local partners. We target at least 30% IRR and an IPO in late 2015. Partners alongside Ergo are Ryan Dodd (CIO), who has returned an average of 35% annually to his fund
>>> investors, and Paul Wilson (MD), a senior executive with two decades
>>> operating experience in Asia; their bios are in the document.
>>> We are preparing for a private placement Series B at the end of Q3 this year and would be delighted to discuss participation with potential
>>> investors.
>>>
>>> To be clear, we also have two additional investment vehicles (actual "funds") through Ergo. Both have very low correlation to the US markets;
>>>

>>> --KREF (Kurdistan Region Energy Fund) which is up 13% this year, and
>>>
>>> --EIP (Ergo Investment Partners, a long-short hedge fund), currently in beta stage and already generating outstanding returns.
>>>
>>> Ryan Dodd also leads investment strategy for these two ventures.
>>>
>>> We would welcome the opportunity to share further details on all of
>>> these opportunities and to update you on our ongoing progress; please
>>> let us know if you would like any further information.
>>>
>>> Best regards, and thanks,
>>>
>>> RP
>>>
>>>
>>>
>>>
>>> Sent from my iPhone
>>